DramaDirectory

Your guide to European TV Drama Commissioning Editors and Buyers

2012 UPDATE

MEDIA

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This Directory is inspired by The EDN Financing Guide, a guide for financing documentary films published by European Documentary Network. (www.edn.dk)

Digital Edition

The publication of this directory is sponsored by the Broadcasting Authority of Ireland.

ACKNOWLEDGEMENTS

We would like to thank a number of people and organisations who have made this publication possible.

Aviva Silver – MEDIA Programme, European Commission
Constantin Daskalakis, Arnaud Pasquali, Nathalie Ducher and Geraldine Hayëz – EACEA
Michael O'Keeffe, Brian Furey and Patricia Kelly – Broadcasting Authority of Ireland
Matheson Ormsby Prentice for Legal advice
All the staff at the European MEDIA Desks and Antennae
All the Participating Broadcasters
Ove Rishøj Jensen – EDN
André Lange & Alison Hindhaugh –European Audiovisual Observatory
Anna Tomba, Alice Butler & Sabrina Koehnke
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INTRODUCTION

The network of MEDIA Desks and Antennae in Europe is delighted to publish the second edition of the Drama Directory, a Guide to European TV Drama Commissioning Editors and Buyers.

We had become aware of an information gap in this area in our work with clients, in particular with applicants for the TV Broadcasting support scheme. We thought the best way to address this was to make use of our own network, with each MEDIA Desk providing information on TV Channels in its own territory. It has proved to be a rewarding collaboration – a true European co-production.

We would like to take this opportunity to thank the participating Broadcasters for their generosity in providing the information contained in this Directory, the European Audiovisual Observatory for allowing us to use information from the MAVISE database and the Broadcasting Authority of Ireland for sponsoring this publication.

This directory is complementary to all market and database initiatives funded by MEDIA with the aim to achieve a transparent single market for all Audiovisual programmes in Europe. Examples of other MEDIA publications include the Training and Networks guide and the Markets and Networks Guide which can be downloaded from the MEDIA website.

We hope the Drama Directory will continue to be a useful resource for Television Drama Producers and Broadcasters alike. We welcome your feedback and suggestions for future editions.

THE MEDIA DESKS AND ANTENNAE

FOREWORD

One of the priorities of the MEDIA Programme is to increase the circulation of European audiovisual works inside and outside the European Union. There are particular challenges involved in seeking to boost the circulation of European Drama projects. We therefore very much welcome the initiative of the European network of MEDIA Desks and Antennae in publishing this Drama Directory which will be a useful resource for European producers seeking investors and buyers for their projects.

The MEDIA Programme supports Television Drama at the development stage through the Single project and Slate Funding support schemes. There is also a dedicated action line to support the Television Broadcasting of European Audiovisual works including TV Drama.

As this scheme requires investment from at least three broadcasters in different member states of the European Union, it is clear that this Drama Directory will prove to be a valuable resource for potential applicants.
The collaboration of the MEDIA Desks and Antenna in creating this Directory is an example of the Network in action and showcases European co-operation at its best.

Aviva Silver
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SUPPORT FOR TELEVISION BROADCASTING

MEDIA offers a funding scheme that supports Television Broadcasting of European Audiovisual Works.

The MEDIA 2007 Programme aims to promote the trans-national dissemination of European audiovisual works produced by independent production companies by encouraging cooperation between broadcasters on the one hand and independent producers and distributors on the other. This scheme is open to Independent European production companies to produce fiction, creative documentaries or animated films.

The following criteria apply.

- The applicant company must have the commitment of at least three broadcasters in different member states of the European Union for the proposed project.
- The minimum eligible duration for individual drama projects or drama series is 50 minutes; 25 minutes for Creative Documentary and 24 minutes for animation projects
- Proposals must be submitted at the latest on the first day of principal photography.
- Applications must have 50% of the production finance for the project in place and the production budget must be minimum 50% financed by European sources.

For Fiction and Animation projects, the maximum sum awarded is €500,000 per work and this financial contribution may not exceed 12.5% of the production budget. The maximum sum awarded for a Documentary Project is €300,000 and may not exceed 20% of the production budget.

In the current MEDIA Programme, there is one call annually with two deadlines per call.

For more information, please contact your local MEDIA Desk – Contact Details are at the back of this guide.

AUSTRIA

The most important broadcaster in Austria is still the public service ORF, which has gradually been losing market share since the introduction of private television. The channels ORF1 and ORF2 had a combined average market share of 37% in 2010 (down almost 10% since 2006). ORF2 is still the most popular channel, with 22.5% of viewers on average. German television is also popular in Austria. The main German private channels have Austrian versions, with a combined audience share in 2010 of more than 25% (the most important of these being RTL Österreich, Sat1 Österreich and Prosieben Austria). German public service channels had a combined audience share of more than 10%. The main private channel is ATV (launched in 2003) with an audience share of 3.4% in 2010. More private channels have recently been launched: Austria 9 TV, (Burda Verlag) in 2007; and Puls 4 (ProSiebenSat.1 Media AG) in 2008. In 2009 Salzburg TV was rebranded as Servus TV and became a national channel. (Audience data source: Eurodata TV Worldwide/ AGTT / GfK Teletest).

Following an investigation completed by the European Commission in 2009 regarding the financing and remit of the public broadcaster ORF, a new media law was passed in July 2010. The regulatory authority KommAustria, was given responsibility for legal supervision of the public service broadcaster (ORF).The financing of the ORF should follow EU standards regarding commercial and non-commercial activities, and a clear public service remit of the broadcaster should be developed. New services have to undergo a "public interest test".

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Das Jüngste Gericht, (The Last Judgement), 2007 – Production Company: Lisa Film

AUSTRIA

ORF

ORF is an independent public service broadcasting corporation. It has two national TV channels: ORF 1 and ORF 2 plus four national and nine regional radio channels, all financed by licence fees and advertising. The TV channels are complementary and are both transmitted by terrestrial network as well as satellite in collaboration with 3sat.

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BELGIUM

The three Communities (Flemish, French and German-speaking) each have responsibility for audiovisual communication and constitute separate markets, the common feature being the fact that all three markets have been extensively cabled for three decades and are thus able to receive the channels of neighbouring countries. They each have their own systems of regulating the audiovisual media and their own public service broadcasters, namely the VRT, the RTBF and the BRF respectively.

The main players in the Flemish Community are VRT, which operates the public channels Één, Ketnet and Canvas, and VMMa (Vlaamse Media Maat schappij), which runs the channels VTM, 2BE, Anne, Jim and vtmKzoom.

Één (VRT) continues to dominate the market, with a steadily rising daily audience share, which reached 33% in 2010 (compared with 28.7% in 2006). Behind Één in audience terms are the channel VTM (20.4%) and the second public channel Ketnet/Canvas (children's programmes during the day and cultural programmes in the evening), followed by VT4 and 2BE. The rest of the market is split between a number of special interest channels set up in the Flemish Community as well as French and Dutch language channels.

In the French Community, the main operators of television channels are, apart from RTBF (La Une, La Deux and La Trois), the RTL group, with its three channels RTL-TVI, Club RTL and Plug RTL that target Belgium but operate under Luxembourg law, and the AB group (AB3, AB4 and AB Shopping). RTBF has significantly modified its range of channels in 2010: it ceased broadcasting its international channel RTBF Sat in February, launched HD versions of its three channels in May and revamped the programming line-up of La Trois in September.

RTL-TVI continues to dominate the market with a 21.5% daily audience (and a prime time market share of 28.8%). The second most important Belgian channel is La Une (RTBF), with a 14.5% market share. The other Belgian channels have a combined share of less than 5% (Club RTL, La Deux, AB3, etc) and a significant number of viewers still turn to the French channels, which command about a third of the audience share. (Audience data source: Eurodata TV Worldwide / CIM / GfK Audimetrie SA)

In the German-speaking Community, the majority of the population (about 74 000 inhabitants) choose to watch the German television channels.

Almost 100% of Belgian households subscribe to pay-TV, this mainly being due to the extent of the country's cable network.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The Spiral. Produced by Caviar, Belgium. Developed with the support of the MEDIA Interactive support scheme.

BELGIUM

BTV (BELGIUM TELEVISION SA)

Created in 2011, BTV operates 2 generalist channels totalling a 5.1% market share in the South of Belgium. AB3 is devoted to fiction (67%) and entertainment for an audience aged 15-34 year old. AB4 focus on fiction (59%) like cult movies and classical series towards an older audience (35+).

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BETV

Owned by cable operator Tecteo, BeTV offers a digital package of thematic channels (pay TV), Be Premium, including cinema (Be1, Be Ciné), series (Be Series) and sports (Be Sport 1, 2 and 3). It also distributes specialized services (Be Enfant, Be Documentaires, Be Charme) as well as a VoD catalogue. 61% of the programming on Be1 is made of films. Most of its acquisitions come from Canal + France.

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RTL-TVI – CLUB RTL – PLUG TV

RTL, a subsidiary of CLT-UFA/RTL Group, operates 3 channels in French-speaking Belgium with a 30% market share. RTL-TVi is a generalist channel combining news programmes, entertainment, commercial films and series (mainly American). Until recently, Club RTL was focused on niche programme for kids, series and films but now it plans to go more mainstream. Plug addresses young adults with series, cult movies, reality shows and music programmes.

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RTBF

RTBF, the public broadcaster in the French-speaking community, operates 3 channels: la Une, la Deux, la Trois. La Une is focused on information, entertainment and generalist programmes. La Deux is more oriented towards series and sports. La Trois is a children's channel in the daytime and a more cultural one (documentaries & films in original version) in the evening.

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VRT (VLAAMSE RADIO-EN TELEVISIEOMROEP) ÉÉN.

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile. From May 2012 on Canvas and Ketnet will operate as separate channels.

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SBS BELGIUM, VT4 AND VIJFTV

VT4 is a private generalist channel with national coverage in Belgium, but focusing on the country's Flemish (i.e. Dutch speaking) community. VT4 offers free tv and broadcasts 168 hours per week. VIJFtv is a lifestyle free tv channel specifically targeted at (young) women in the Belgian-Flemish community. VIJFtv also airs 168 hours per week.

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VMMA (VLAAMSE MEDIA MAATSCHAPPIJ), VTM AND 2BE

VTM is the main private generalist channel in the Flemish community of Belgium. The channel is also available in the German-speaking regions of Belgium. It is a paid access channel and is active 168 hours per week. 2BE is a national entertainment channel targetting the Belgian-Flemish community but which is also available in Belgian-German-speaking communities.

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CYPRUS

The broadcasting market in Cyprus is dominated by the channels of the public service broadcaster CYBC (RIK1, RIK2, RIK HD and RIK Sat), which had a combined audience share of 19.7% in 2010, and four national private channels: Sigma, ANT1, Mega and Plus TV, who all registered an increased audience share in 2010 (21.3%, 20.7%, 14.3% and 4.1% respectively). (audience data source : Eurodata TV Worldwide / AGB Nielsen Media Research Cyprus)

As well as ANT1 and Mega, a new sister channel of a Greek commercial station was launched in 2011 (Mad Cyprus) and another is expected by the end of 2011, with the free terrestrial channel Star Channel Cyprus due to replace terrestrial pay-TV channel Alfa TV, which was taken off the airwaves in summer 2011.

The transition to DTT has particularly affected the local television landscape in Cyprus. In the absence of a local DTT network, several local stations have begun to broadcast nationally, in some cases with a revised programme schedule, while others have had to cease broadcasting either temporarily or permanently.

Analogue terrestrial signals were switched off on 1 July 2011, after a short transitional period.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

CYPRUS BROADCASTING, CORPORATION (CYBC)

CyBC is a generalist channel broadcast by the Cyprus Broadcasting Corporation. It has national coverage and is broadcast in Greek. It is a free HD public channel, broadcast over the DTT network.

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ANT1 TV

Launched in 1993, Ant1 TV is an analogue terrestrial generalist channel with national coverage, broadcast in Modern Greek. The channel is free and active 168 hours per week. Ant1 TV is a sister channel of ANT1 TV (Greece). It was the first private channel to be launched after Cyprus broadcasting liberalisation.

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SIGMA TV

Sigma TV is the main private TV channel in Cyprus and main TV channel in Cyprus in terms of audience. SIGMA has a programmes deal with the Greek channel Star Channel. Sigma targets mainly young urban adults. SIGMA prime time schedule is composed of local (40%) US (25%), mainland Greek (15%) and other (20%) programming. It has free national coverage, active 168 hours a week and is broadcast in Modern Greek.

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CZECH REPUBLIC

In the Czech Republic, the television market continues to be dominated by the private channel Nova TV (Central European Media Enterprises), which in 2010 had a market share of 32.8 % (down 9 % since 2006). The public service broadcaster Czech Television, had a total market share of 28.3 % thanks to the growth of CT24 and CT4 In third place is the private channel Prima TV (Modern Times Group), which had a share in 2010 of 16.4% (down from 20.2% in 2006). (Audience data source: Eurodata TV / ATO / Mediaresearch)

All the main operators have launched additional channels over the past 3-4 years. The Nova TV family channels include Nova Sport and Nova Cinema (and the main channels are also broadcasting in HD). The public service broadcaster has a sport and a news channel (CT 4 Sport and CT 24), and has also launched a HD channel (CT HD). Prima TV launched two entertainment channels in 2009: Prima Cool targeting men, and R1, which targets women. R1 has not yet officially launched but shares channel space with Prima Cool on the DTT network. It currently provides a space for the R1 regional channels network established in 2008

On 6 September 2011 the Parliament of the Czech Republic adopted amendments to audiovisual legislation that concern advertising and teleshopping in public television programmes and the funding of Czech cinematography.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ČESKÁ TELEVIZE (CZECH TELEVISION)

Česká televize is Czech public service broadcaster. It is financed mostly from television licence fees, partly from business activities. It broadcasts on four channels: ČT1, ČT2, ČT24 (news channel) and ČT4 (sport channel). While ČT1 is a mainstream channel for the wide public, ČT2 is targeted at minorities. The programming offers news, current affairs, documentaries, art programmes, drama, sports, entertainment and educational programmes as well as programmes for children and youth.

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TV NOVA

CET 21 is a private broadcaster which broadcasts on several channels: Nova (private channel with the biggest market share), Nova Cinema, Nova Sport (sport channel) and MTV Czech Republic. The programming of Nova is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Nova Cinema offers mostly feature films and TV series.

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PRIMA TV

FTV Prima is a private broadcaster which broadcasts on three channels, Prima family, Prima COOL and Prima Love. Prima family's programming is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Prima COOL is an entertainment channel broadcasting mainly American films, TV series, sport and entertainment programmes. Prima Love is a new channel (broadcasting since March 2011) targeted at women, broadcasting films, TV series and talk shows.

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CZECH REPUBLIC

HBO CZECH REPUBLIC

HBO Czech Republic is the Czech subsidiary of Home Box Office (HBO). It is transmitted by cable and satellite networks and it broadcasts mostly feature films, TV series and documentaries. It operates several channels: HBO, HBO2, Cinemax, Cinemax2 and AXN.

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DENMARK

The Danish market is the only one in Europe in which public channels, operated by the two public broadcasters, DR and TV2, still attract more than half of average daily audiences. The TV2 channel continues to dominate the market (28.1% of daily audiences in 2010), followed by DR1 (19.2%). The two main public channels therefore account for 47.2% of average daily audiences in 2010 (61.9% in 2006). Despite the creation of various special-interest channels, the entire public sector saw its total audience drop from 72.4% in 2006 to 62.9% in 2010. The most popular private channel is TV3 (Swedish MTG group), with a steady daily market share of 5%. The other main private channels are TV3+ (MTG group, 3.4% daily audience share) and Kanal 5 (ProSiebenSat.1 Media AG), whose daily audience share grew from 2.9% in 2009 to 3.4% in 2010. (Audience Data Source: Eurodata TV Worldwide / Gallup TV meter)

The Danish public authorities decided to privatise TV2 in May 2003, but implementation of this decision was delayed after questions were raised concerning the financing of the broadcaster. In May 2004, the European Commission concluded that TV2 had received illegal public funding and demanded that it pay back EUR 84.4 million to the Danish authorities. An appeal was lodged against the recapitalisation plan and the Court of First Instance of the European Communities set aside the Commission's decision in its judgment of 22 October 2008. In spring 2008, the Ministry of Culture announced that emergency aid would be provided to stabilise TV2, which is heavily in debt. This aid, amounting to EUR 67 million, was approved by the European Commission in August 2008. Finally, in January 2009 the government published a plan aimed at partially transforming TV2 into a pay-TV channel from 2012.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Lærkevej (Park Road), 2009. Production Company: Cosmo Film

Anna Pihl, 2006. Production Company: Cosmo Film

DENMARK

DR TV

DR (Danish Broadcasting Corporation) is Denmark's oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organization and the tv channel in 1951. DR does not possess any RTB licence but has signed a public service contract with the Ministry of Culture. The channel is completely financed by public revenues (there are no advertising revenues). DR TV comprises two channels, DR1 and DR2 - and three new channels from November 2009: DR K (Culture, history, music), DR Ramasjang (Children's programming) and DR HD (Programmes in HD). Over the years DR has built up a strong fiction brand, especially on Sunday evenings at 20h. DR has produced a number of award winning tv series, such as *The Protectors* (2010), *Unit One* (2002), *Nikolaj & Julie* (2003), *The Eagle* and *Young Andersen* (2005). And with additional nominations for series like *Better Times* (2004), *The Killing* (2007 and 2008) and *Mille* (2009), DR has established itself as an important player in the international world of drama production.

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TV2

TV 2 is a publicly owned television station in Denmark based in Odense. The schedule is Public Service driven with emphasis on a full range schedule and a strong backbone of Danish produced programming. TV 2's economy is solely based on advertizing revenues. TV 2's overall share (21-50) is 30% and the commercial share (21-50) is 49%. TV 2 has five subsidiary stations known as TV 2 Zulu, targeted at youth, TV 2 Charlie, oriented towards older audiences, TV 2 News,TV 2 Film, a non-stop movie channel and TV 2 Sport, as well as the internet-based pay-per-view channel TV 2 Sputnik. TV2 has aired a number of successful Danish TV fiction, such as *Anna Pihl* and *Lærkevej* (both MEDIA supported).

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TV3 DENMARK

TV3 is one of the channels owned by the Viasat Corporation. They are broadcasting from the UK. There are a number of sister channels like TV3+, TV3 Puls, TV2 Sport, TV1000 and more. The last few years TV3 has started to include Danish TV-fiction in their schedule and have had success with series like *2900 Happiness* and *Lulu & Leon*.

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SBS TV

SBS TV is part of one of Europe's biggest TV and radio broadcasters, the German ProSiebenSat1 Media. In Denmark SBS TV consists of four TV stations Kanal 4, Kanal 5, 6'eren and The Voice TV plus two radio stations The Voice and Nova FM.

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DENMARK

FINLAND

Finland is one of Europe's most advanced countries in terms of digital broadcasting: analogue terrestrial signals were switched off in 2007 and cable television transmissions have also been fully digitised since 2008. Finland is now turning to second generation digital terrestrial television (DVB-T2). However, these changes have not radically altered the balance in the broadcasting market, where the main players remain the public group YLE (YLE TV1, YLE TV2, YLE Teema and Swedish-language channel YLE FST5), the Finnish private media group Sanoma (Nelonen, JIM, LIV) and Swedish group Bonnier (MTV3, Sub and Nordic Canal+ pay-TV channels).

The public broadcasting group YLE regained some ground in 2010 and had an audience market share of 45.1%. In particular, YLE TV1 stabilised its daily audience market share at 21.6%, whilst YLE TV2 gained more than a percentage point to return to 19.4%. The audience of the first private channel, MTV3, has continued to decline reaching 21.5%, which is a loss of nearly 8% since 2006. (Audience Data Source: EurodataTV Worldwide/Finnpanel)

The Finnish multi-channel distribution market continues to be dominated by cable services. Although there are still more than 20 active operators, the market is becoming more concentrated. In particular, in July 2010, DNA took control of the cable activities of Sanoma Television, i.e. its Welho package.

Due to the popularity of cable television in Finland, satellite and IPTV packages are struggling to break through.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Jälkilämpö, (Latent Heat), 2009 – Production Company: Kinotar Oy

Alamaailma (Underworld Trilogy), 2011 – Production Company: Vertigo Oy

FINLAND

MTV MEDIA

MTV MEDIA has 10 TV channels: MTV3, Sub, AVA and the MTV3 Channel Package, which is a pay-TV package comprising MTV3 MAX, MTV3 Fakta, MTV3 Leffa, MTV3 Juniori, MTV3 Komedia, MTV3 Sarja and MTV3 Scifi. MTV MEDIA represents CANAL+ pay-TV services in Finland. MTV MEDIA (MTV Oy) is owned by Nordic Broadcasting Oy, which is owned by the Swedish publisher Bonnier AB. The MTV3 Channel Package was launched in November 2006. MTV MEDIA has been representing the CANAL+ pay-TV Services since 2009.

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NELONEN MEDIA (CHANNEL FOUR FINLAND) / SANOMA ENTERTAINMENT FINLAND LTD.

Nelonen Media is currently running a total of eight TV channels in Finland, including the 2nd biggest nationwide advertising-funded free-to-air television channel Nelonen (Channel Four Finland). The company also operates two basic cable channels (Nelonen Kino and Nelonen Perhe) with a strong emphasis on international feature film content.

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THE FINNISH BROADCASTING COMPANY (YLE)

Yle is Finland's national public service broadcasting company. Yle operates four national television channels and six radio channels and services complemented by 25 regional radio programmes

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FINLAND

FRANCE

The channel TF1 still has the largest audience share but only had a daily audience share of 24.5% in 2010, which was 7.1 percentage points lower than in 2006. This was the third consecutive year in which the private channel's daily audience was below 30%. In second and third place respectively were the two public channels France 2 (16.1%) and France 3 (10.7%), both of which are also experiencing a steady decline in their audiences. In particular, France 3 is followed close behind by M6 (10.4%). Following these, eleven channels have audience market shares of between 1 and 4%. These include a number of new free-to-air DTT channels, such as TMC (TF1 Group) and W9 (RTL), which hold market shares comparable to those of the incumbent terrestrial channels, such as Canal+, France 5 and Arte. The new free-to-air DTT channels had a combined daily audience share of 19.7% in 2010, compared with 15.2% in 2009 and 11.1% in 2008. (Audience data source: Eurodata TV Worldwide / Médiamétrie / Médiamat).

The Canal+ group's acquisition of the TPS package in 2007 was challenged in September 2011 by the Competition Authority, which withdrew its decision to allow the merger and fined Canal+ 30 million euros, stating that the company had not met the commitments it had entered into at the time (especially with regard to making channels available to third-party distributors). In addition, Canal+ and Orange, which were for a long time locked in a dispute about rights and channel exclusivity, announced they had reached an agreement in July 2011 on the acquisition by Canal+ of a 33.33% stake in Orange Cinéma Séries, the package that groups together Orange's five premium cinema and fiction channels.

The reform of public audiovisual services, which began in 2008, has continued to generate debate in France. The public broadcasters were combined into a single company (France Télévisions) on 1 January 2010.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Borgia. Produced by Canal+, Atlantique and EOS with the support of the MEDIA TV Broadcasting scheme.

FRANCE

ARTE FRANCE

ARTE is a French-German cultural channel broadcast by a French-German trust consisting of ARTE France and ARTE Deutschland GmbH, each holding a share of 50%. The two country poles deliver proposals for programmes. The central office of ARTE, located in Strasbourg, is responsible for the editorial line of programmes, the programme schedule and the broadcast.

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ARTE GEIE

ARTE GEIE is a public television broadcaster. The ARTE Group is composed of three entities: the headquarters in Strasbourg (ARTE GEIE) and two Members responsible for programme production and delivery, which are ARTE France in Paris (ARTE FRANCE (S.E.P.T.)) and ARTE Deutschland TV GmbH in Baden-Baden (ARTE DEUTSCHLAND TV GMBH).

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FRANCE

CANAL J

Canal J is a Children's (4–14) entertainment channel. Magazines, fiction, cartoons, etc.

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CANAL PLUS

National generalist pay-tv channel whose programming mainly consists of sports programmes, cinema, documentaries and magazines.

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DIRECT 8

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FRANCE 3

National public service broadcaster with 13 regional units.The regions produce and co-produce both regional and national programmes.

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FRANCE 4

Arts, fiction and entertainment channel. Owned by France Télévisions (89%) and Arte (11%).

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LAGARDÈRE ACTIVE (CANAL J, GULLI, FILLE TV, TIJI)

Entertainment channel targeting female young adults (20 to 30 years old). Programming is composed mainly with TV fictions and magazines. The channel replaced Filles TV in October 2009, which was launched in 2004, targeting 11 to 17 year old girls.

JUNE (Ex-Filles TV)
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M6

Second free-to-air commercial generalist channel in France. 48,6% owned by RTL Group.

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13 ÈME RUE/SYFY (NBC UNIVERSAL GLOBAL NETWORK)

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RTL9 (FRANCE)

RTL9 is broadcast via cable and satellite in France, and has also long been broadcast on the analogue terrestrial network in Lorraine (French region located near the Grand Duchy of Luxembourg) and in the Grand Duchy of Luxembourg (but analogue transmissions were shut down in July 2010). RTL9 is jointly owned by Groupe AB and by CLT-UFA.

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SÉRIE CLUB

Série Club and TF6 (50%-owned), target audiences looking for entertainment and series.

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TF1

TF1 is a national French TV channel, controlled by TF1 Group, whose major share-holder is Bouygues. TF1's average market share of 24% makes it the most popular domestic network. Flagship shows include Star Academy (Endemol's international competitor to the X Factor franchise), CSI and House, M.D. TF1 originally stood for Télévision Française 1 (French Television 1). Since its privatisation in 1987, the abbreviation is no longer expanded, so as to avoid confusion with the Entertainment channel targeting young adults. Jointly owned by the two main French commercial broadcasters (TF1 and M6).

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TF1 INTERNATIONAL

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TV5

Number 1 French-language channel worldwide, reaching 120 million homes across the 5 continents.

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GERMANY

The television market in Germany is one of the largest in Europe and is also very competitive. More than 37 million households had a TV set at the end of 2010 in Germany, of which 50.2% received television by cable and 44.7% by satellite. The number of households with access to digital television had reached almost 68% by June 2011, according to the figures published by the ALM (Association of State Media Authorities).

Regarding audience share, the public service channels remain strong. The two national public service channels (ARD and ZDF) had a combined share of 25.9% in 2010 (down from 27.8% in 2006). For the first time RTL moved ahead of ARD (Das Erste) in 2010 to become the most popular channel, although only leading by a small margin (a difference of 0.4%). (Audience data source: Eurodata TV Worldwide / AGF / GfK)
Cable represents the most common mode of television distribution, and the digitisation of the network reached almost 43% by July 2011. The sector has experienced major consolidation in the last few years. There are now just four major operators. Kabel Deutschland, the country's leading cable operator, had 8.7 million subscribers in June 2011.

Changes to media legislation were introduced in the 15th amendment to the German Inter-State Broadcasting Treaty signed in December 2010. This addressed a reform of the collection of the licence fee for the public service broadcaster. The Prime Ministers of the German states agreed in June 2010 on a proposal that would impose a charge per household (household tax) rather than a charge per device that can receive broadcast signals. The changes are likely to be implemented from 2013. Future amendments to the Inter-State broadcasting Treaty will address protection of minors, and media concentration.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

TV movie *Der Chinese (The Chinese Man)*, 2011- Production Company: Yellow Bird Pictures (supported by the MEDIA TV Broadcasting scheme)

Hindenburg, a TV movie in two parts. Production company: teamWorx 2011 (supported by the MEDIA TV Broadcasting scheme). (Photo: RTL)

ARD – DAS ERSTE

The following programme is being broadcast by the regional stations: The common programme Das Erste, a „morning" and a "midday" magazine, together with ZDF. They run eight third programmes. Also together with ZDF, ARD is running the children's programme channel K.I.K.A., an „event" / current affairs and documentary channel PHOENIX and together with the French TV production house ARTE France, the European cultural programme ARTE. 3sat is jointly run by ZDF, SRG, SSR ideé suisse and ARD. Within the programme ARD Digital, ARD broadcasts the additional programmes EinsExtra, EinsPlus and EinsFestival

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GERMANY

ZDF – ZWEITES DEUTSCHES FERNSEHEN

Second public channel with full programme.

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HR Spielfilm / ZDF neo
Spielfilm-Leitung@zdf.de

GERMANY

3SAT

3sat is the common full programme by the four public broadcasters ZDF and ARD from Germany, the ORF from Austria and the SRG SSR (Swiss television), completely without advertising slots.

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NDR – NORDDEUTSCHER RUNDFUNK (NORTHERN GERMAN BROADCASTER)

NDR is a regional public service channel providing generalist programming and information about the Länder Bremen, Hamburg, Mecklenburg-Vorpommern, Niedersachsen, and Schleswig-Holstein. Being the so-called "third ARD channel" in this region, the channel broadcasts its own programmes. As a member of ARD, it also provides programmes to the first ARD channel (Das Erste).

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RTL TELEVISION GMBH

RTL Television is Germanys leading private broadcaster among young viewers (14 to 49 years) and the general public alike. RTL features a strong line-up with highlights in all genres including big entertainment shows such as „Das Supertalent" (Got Talent), „Deutschland sucht den Superstar" (Idols) or the quiz show „Wer wird Millionär?" (Who Wants To Be A Millionaire?), factual entertainment formats such as „Bauer sucht Frau" (The Farmer Wants A Wife) and „Rach, der Restauranttester", popular US series including „Dr. House" and „CSI: Miami", the most popular german daily soap "Gute Zeiten, schlechte Zeiten" (Good Times, Bad Times), fiction formats like the action series „Alarm für Cobra 11", comedy shows such as „Cindy aus Marzahn & Die jungen Wilden" and „Die Bülent Ceylan Show", news programmes like „RTL Aktuell" and live sporting events such as the Formula 1. RTL Television is part of the The Media Group RTL Germany, one of the leading media companies in Germany.

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VOX TELEVISION

The Channel from Cologne shows fascinating documentaries and reports and its porgramme includes a lot of current US-series, enthrallling motion picture highlights as well as their own versatile formats from the areas „cooking", „animals" and soap operas.
VOX belongs to the RTL-network and doesn't broadcast its own motion picture productions. RTL is also the purchaser for VOX motion picture.

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PROSIEBEN TELEVISION GMBH & SAT.1 SATELLITEN FERNSEHEN GMBH

Free TV private channel in a network; part of the German channel network ProSiebenSat1 TV Deutschland GmbH (company of the ProSiebenSat1 Media AG).

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KABEL EINS

Kabel eins is a generalist commercial channel owned by ProSiebenSat.1 Media AG. Its target audience is aged between 30-49. It is a private TV channel of the channel network ProSiebenSat1. The programme mainly consists of bought motion feature films and series. Only the entertainment formats with daily news, report-magazines and documentary broadcastings are produced by the channel or by order. The programme explores culture, science as well as entertainment and also aims to appeal to older age groups.

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TELE 5

TELE 5 is a national Free-TV channel that addresses all viewers with a broad fictional programming of feature films, series and docu-fiction. Own productions like „Gottschalks film column" and "Gottschalk's Classics" - a cinema magazine - complete the wide range of content. As a subsidiary of the Tele Munich Group (TMG), TELE 5 has access to their programme catalogue with German - speakingTV rights to more than 5000 feature films, TV movies and mini-series. Additional acquisitions from major studios and independent distributors complement the versatile movie- and series programme. TELE 5 is receivable nationwide in over 32 million households via cable and satellite, in metropolitan areas also via DVB-T.

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GERMANY

KIKA
DER KINDERKANAL VON ARD UND ZDF

Television channel operated jointly by ARD network and ZDF, Series, feature films, magazines, documentaries, news and current affairs programs, specialties and programming days dedicated to topical issues, in-house productions, live broadcasts, numerous first broadcasts, as well as classics of children's programs produced by ARD and ZDF. Offering a large variety of high-quality, target-group-oriented programs free from commercials, for children aged three to thirteen.

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BR – BAYERISCHER RUNDFUNK

Bayerischer Rundfunk is Bavaria's public broadcasting service with two television programmes which reach most of Western Europe. As part of the Ard network, BR makes a significant contribution to the five main national ARD TV channels in Germany. Feature films and documentaries are a priority.

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GERMANY

MDR – MITTELDEUTSCHER RUNDFUNK

The MDR is a public, terrestrial broadcaster based in Leipzig. Belonging to the ARD-consortium of public broadcasting stations, the RBB contributes to the output of the national tv-channel 'Das Erste' and also produces regional television programmes for Saxony, Saxony-Anhalt and Thuringa. The RBB Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

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RBB

The RBB is a public, terrestrial broadcaster based in Berlin and Potsdam. Belonging to the ARD-consortium of public broadcasting stations, the RBB contributes to the output of the national TV-channel 'Das Erste' and also produces regional television programmes. The RBB Drama Department commissions TV-movies as well as series, serials, debuts and feature films.

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WDR – WESTDEUTSCHER RUNDFUNK

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HR - HESSISCHER RUNDFUNK

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GERMANY

GREECE

The Greek audiovisual market is characterised by the strength of the private channels compared with the public channels of the broadcaster ERT. MEGA still led the market in 2010 with a 20.5% daily audience market share, gaining more than two percentage points in two years. ANT1 was in second place with a 15.8% audience share, followed by Alpha TV (RTL group), Alter and Star channel, whose market share ranged from 9.8% to 12%. The first public channel, NET, was only in sixth position with 8.6%, far ahead of the two other public channels ET3 and ET1, with only a 3.5% and 2.9% audience share respectively. (Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research)

The market is thus overwhelmingly dominated by the incumbent terrestrial channels. Over 80% of homes still rely on the terrestrial broadcasting infrastructure, which is still to a large extent analogue.

The public service broadcaster ERT is still in a period of crisis. After the changes in governance adopted in 2010 and following the merger of the digital channels Sport+ and Cine+ to form a single channel in April 2011, new savings measures were announced in August 2011: the closing down of the first channel ET1, a reduction in the number of local radio stations and staff cutbacks.

In the absence of a cable network, the supply of pay-TV services is largely dominated by the Nova satellite package, which reported a rise in the number of subscribers in 2010. Greek and Cypriot packages have been put together by Multichoice Hellas whose monopoly on the satellite pay-TV market in Greece is likely to be challenged following the launch in October 2011 of the OTE TV package.

ERT S.A.
ELLINIKI RADIOPHONIA TILEORASSI

The Hellenic Broadcasting Corporation (ERT SA) is the Greek Public service Broadcaster and is supervised by the Ministry of the State. It broadcasts from three broadcasting terrestrial television channels; ET-1, NET and ET-3 and one satellite station (ERT WORLD). ET-1 is primarily a cultural channel. Its specialized programs highlight Greek culture as well as films from contemporary Greek cinema. NET is primarily a news and current affairs channel, but also broadcasts popular fiction series, drama and sitcoms. ET-3 has a separate administrative structure with its headquarters in Thessaloniki. With a nationwide transmission, it focuses on issues concerning Northern Greece as well as the wider Balkan and Southeastern European issues.

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GREECE: COMMERCIAL BROADCASTING CHANNELS

There are a number of Commercial channels in Greece which commission or acquire TV Drama including the subscription channel Nova.

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ICELAND

All along since the establishment of Icelandic TV in 1966 the major characteristics of the programming is its high percentage of foreign origin. Iceland is a small language community and local production is far more expensive than the price of foreign material. However, local production has developed, both in numbers and quality. In 20 years, 1995-2008, the three main channels, RUV, Stöd 2 and Skjárinn, almost doubled their production time, from 1.800 hours in 1995 up to 3.500 hours in 2008. The combined local productions remained around 25% af the transmissions.

At present there are ten national channels. New technology, the arrival of specialized channels and not least condensation in the marketplace make this possible. Icelandic channels with some own programming at the end of year 2009 were as follows. (Years of founding in parenthesis): RUV Sjónvarp (1966), Stöd 2 (1986), Omega (1992), Stöd 2 Sport (1995), N4 (1997), Stöd 2 Bíó (1998), Stöd 2 Extra (1998), Skjár 1 (1998), ÍNN (2007), Nova TV (2008).

The archrivals on the market are RUV and Stöd 2. General channels with varied programmes are RUV, Stöd 2 and Skjár 1. The other seven are more or less specialized channels that mostly try to care for the interests of certain audience groups. All but one are transmitted from Reykjavík, the capital of Iceland. N4 is based in Akureyri, "the capital of the North".

Only four years after the dawn of digital transmissions in Iceland late 2005, six of every ten households in the country had access to a digital receiver. Audiences can tune in to lots of foreign television channels distributed by seven different companies, mostly telecoms, either through cable or antenna. Since 2005 video on demand (VoD) has been offered by some of the telecoms.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Both of these images are from *The Cliff (Hamarinn)*, 2009. Production Company: Pegasus.

RIKISUTVARPID, RUV

Rikisutvarpid, RUV, The Icelandic National Broadcasting Service, is a public service broadcaster owned by the Icelandic state. RUV is financed by state funding and revenues from advertisements. RUV's income can only be allocated for broadcasting purposes. RUV's television network reaches 99,9% of households; market share in viewing throughout 2010 was 51,7% for RUV TV. According to the Broadcasting Act the main obligation of RUV is to promote the Icelandic language and history as well as Iceland's cultural heritage.

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ITC SKJARINN

ITC Skjarinn is an independent media company which divides into four different media units. The cable service distributes over 60 foreign cable channels including DR1, Discovery, BBC World News and more. The VOD service offers the largest VOD service via IPTV in Iceland. Screen One is a pay TV channel financed by subscription fees and advertising revenue. Its main programming needs are scripted dramas and high quality entertainment content. Screen One also produces it's own local programming. Screen One also produces it's own local programming, both scripted and entertainment.

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ICELAND

STÖÐ 2 (CHANNEL 2)

Stöð 2 (Channel 2) is an ad-supported subscription TV channel founded in 1986. On average 45% of Icelandic households subscribe to Stöð 2. Stöð 2 is a part of 365 Media, Icelands leading media company. Stöð 2 offers a selection of the world's highest rated TV shows, award-winning series, latest Hollywood blockbuster features, the most popular local programming, scripted and non-scripted as well as daily local news and news related programming. As a brand Stöð 2 operates several other subscription channels including two sports channels and a movie channel.

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ICELAND

IRELAND

In Ireland the national public service broadcaster remains the strongest player in the TV market while British channels and companies continue to play an important role. The public service channels, RTÉ1 and RTÉ2, had a combined market share of 33.1% in 2010 (almost 5% less than in 2006). The private channel, TV3 (launched in 1998) had a 12.4% market share, and is now the second most popular channel. The other two national Irish broadcasters are the public service Irish language channel TG4, and the entertainment channel 3e (owned by TV3). The five most popular UK channels are ranked in the following order: BBC1, UTV, S4C, BBC2, and Sky 1 (with a combined share of 15.1% in 2010). With the launch of DTT services, the public service broadcaster has also launched additional digital channels (Audience data source: Eurodata TV / AGB Nielsen Media Research)

The introduction of DTT in Ireland was long delayed but is finally under way since the end of 2010. The Broadcasting Authority of Ireland announced in August 2010 that commercial DTT has been ruled out for the time being, but the tender for the Multiplexes may be re-launched in 2013 after switch-off. The multipexes of the PSB RTÉ were launched in October 2010 as a trial, with the full service "Saorview" launched in May 2011. The total offer now includes the channels RTÉ 1, RTÉ 2, TV3, 3e, TG4, and RTÉ News Now. New services launched by the PSB are the following: RTÉjr (children) RTÉ One + 1, RTÉ Aertel Digital (teletext), and a trial HD service. Switch-off is planned for October 2012.

The Broadcasting Act of 2009 consolidated all previous broadcasting legislation. The Act also established the new broadcasting regulatory authority (the Broadcasting Authority of Ireland – BAI, which merged the Broadcasting Commission of Ireland (BCI) and Broadcasting Complaints Commission (BCC). The BAI was officially launched in October 2009 and now also has responsibility for the regulation of public service broadcasters in Ireland.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Trivia, 2010 – Production Company: Grand Pictures. Developed with the support of the MEDIA Slate Funding scheme.

IRELAND

RTÉ

Raidió Teilifís Éireann, (*Radio [and] Television of Ireland*; abbreviated as RTÉ) is a semi-state organization and the public service broadcaster of Ireland. It both produces programmes and broadcasts them on television, radio and the internet. RTÉ operates two free-to-air television channels, RTÉ One and RTÉ Two. RTÉ One is the main channel providing a comprehensive range of home-produced Irish factual, entertainment, drama and lifestyle programming, which is complemented by selected acquired material. RTÉ Two is a mixed-genre channel appealing to a variety of audiences across the schedule. During daytime its primary focus is children and sports; in the evening it targets viewers of a young mindset with innovative drama, entertainment and key acquisitions.

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TG4 (Irish: TG Ceathair or TG a Ceathair) is a public service broadcaster for Irish-language speakers. The channel has been on-air since October 31, 1996 in the Republic of Ireland and since April 2005 in Northern Ireland. The daily Irish language programme schedule is its core service: seven hours of programming in Irish supported by a wide range of material in other languages such as French and English.

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TV3 is a commercial free-to-air television broadcaster in the Republic of Ireland and Northern Ireland which launched on September 20, 1998. It was the country's first independent commercial broadcaster. TV3 is operated by the TV3 Group which also consists of television channel 3e and the online service tv3.ie

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ITALY

Italy's two most watched channels are still RAI Uno, the first public channel, and the private channel Canale 5 (Mediaset), which had daily audience market shares of 20.7 and 18.8% respectively in 2010. RAI broadcasts more than twenty channels in Italy and five international channels. In May 2010, it absorbed its subsidiary Raisat and the Raisat channels were all renamed. In 2010, all the RAI channels regained a 0.6% market share while the three general entertainment channels of the Mediaset group (Canale 5, Italia 1 and Rete 4) lost 2.7%. Apart from the seventh terrestrial analogue channel La 7, with a stable market share of around 3%, and the children's channel Boing TV (Mediaset group), no channel has a daily audience share of more than 1% in Italy. The incumbent terrestrial general-interest channels still pull in nearly 75% of viewers. (Audience data source : Eurodata TV Worldwide / Auditel / AGB Nielsen Media Research Italy).

This concentration of audience share is all the more surprising in Italy as the country has a large number of channels: there are more than 400 national and nearly 600 regional and local channels. The leading channel operators are the public service broadcaster RAI and the private groups Mediaset and News Corporation, whose subsidiary Sky Italia became the leading Italian television group by operating revenue in 2010.

The Mediaset group controls 42 Italian channels (including one international channel). It also has assets in Spain: in addition to the channel Telecinco, it took control of Cuatro in 2010 and acquired a 22% stake in the satellite operator Digital+. In Tunisia, it has a stake in the channel Nessma TV.

Through its subsidiaries Sky Italia and Fox Italia, News Corporation operates more than 90 channels in Italy, 25 of them targeting other countries. The subsidiary Fox International also broadcasts channels to Germany, Benelux and the Baltic countries.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Dieci Inverni, 2009 – Production Company: Raicinema

ITALY

RAI CINEMA SPA

RAI Cinema, part of the RAI Group, was conceived with the principal objective of giving strength to the Italian Film Industry. One of the principal obligations is to invest in Italian Cinema, thereby contributing to an integral part of Italian culture.

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RAI TRADE SPA

From archives to soundtracks, from major sports events to documentaries, from mini-series to news, from films to entertainment: Rai Trade is the exclusive distributor in Italy and abroad of all rights to Rai's productions. One of its objectives is to contribute to the spread of "Made in Italy" products throughout every sector of the audiovisual industry

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MEDIASET DISTRIBUTION - RTI SPA

Mediaset Distribution is the International Distribution arm of Mediaset Group, the biggest private media company in Italy, the only European major in the industry and one of the most important players in the world's media. Mediaset Distribution commercialises worldwide its ready made programming, scripted formats and international linear channel Mediaset International. With a catalogue of over 500 titles and an average investment of milion euros in new productions, Mediaset Distribution is the leading distribution company of Italian TV Products.

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SKY ITALIA SRL

Sky Italia S.r.l. is an Italian digital satellite television platform owned by News Corporation launched on 1st August 2003, when the former platforms Tele+ (Canal+) and Stream TV (News Corporation and Telecom Italia) merged together. It is similar in many ways to BSkyB's Sky Digital in the United Kingdom and Ireland, and like that network it is a major sports broadcaster

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ITALY

NETHERLANDS

The most important players in the Dutch market are the public broadcasters, with the national channels Ned 1, Ned 2, Ned 3, and all the digital channels grouped together under the Ned 24 banner, as well as the RTL group, whose channels RTL 4, RTL 5, RTL 7, RTL 8 and RTL Lounge are transmitted under Luxembourg law. The third provider, SBS Broadcasting (NET 5, SBS 6 and Veronica), was sold by ProSiebenSat.1 Media AG in May 2011 to Joop de Mol's Talpa Media group, which is associated with the Finnish group Sanoma.

In 2010, the daily audience share of Ned 1 rose by 1.5%, thus enabling the channel to reach 21.5%, which was higher than the figure posted in 2008. Following the public channel in audience share terms are the private channels RTL4 and SBS6 with 14.4 and 10% respectively. Their market shares have actually risen in the past two years. The two other public channels (Ned 2 and Ned 3) each have a daily share of slightly under 7%, while the figure for the four private channels - NET 5, RTL 7, RTL 5 and Veronica - is between 3 and 5%. Eight other channels have a daily audience of between 1 and 2%. (Audience data source: Eurodata TV Worldwide / Stichting Kijkonderzoek).

The Dutch public service broadcasting system is made up of some twenty national and 350 local broadcasters. On 16 December 2010 the General Court of the European Union handed down a decision in an action for annulment brought by the Netherlands and the Dutch Broadcasting Foundation - NOS, a public service broadcaster, regarding state aid for the latter. After receiving complaints by several Dutch commercial broadcasters, the Commission initiated an investigation regarding the funding of public service broadcasters in the Netherlands. It concluded EUR 76.327 million, plus interest shoulfd be repaid by NOS.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Annie MG, 2009 – Production Company: BosBros, with co-producers the broadcasters VRT, VARA & NPS

Het Gordijnpaleis van Ollie Hartmoed produced by Lemming Film co-produced by Willy Waltz (NL), A Private View (BE) and broadcaster VPRO, VRT. Developed with the support of the MEDIA Programme (Slate Funding). Released December 2011

NETHERLANDS

AVRO

AVRO is one in the group of the 9 biggest broadcasting associations in the Netherlands, and is financed by license fees and advertising. AVRO Culture & Arts transmits on Nedeland 2. All other Avro programmes are transmitted on Nederland 1, 2 and 3.

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BNN

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NETHERLANDS

EVANGELISCHE OMROEP

EO is financed by the Dutch government. It transmits on Nederland 1, 2 and 3 which are national channels that transmit by cable and terrestrial network.

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NETHERLANDS

HUMAN

The Humanistische Omroep (HUMAN) is one of the smaller public broadcasting organizations in the Netherlands. It is a public service association. HUMAN produces programmes for Dutch television, makes radio talkshows and interactive websites.

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NETHERLANDS

KRO

KRO is one in the group of 9 biggest broadcasting associations in the Netherlands, and is financed by licence fees and advertising. KRO transmits on Nederland 1, 2 and 3 which are national channels, that transmit by cable and terrestrial network.

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NETHERLANDS

OMROEP MAX

Omroep MAX is a station broadcast in The Netherlands. MAX's programming focuses on people aged 50 years and older. MAX transmits on Nederland 1 and Nederland 2.

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NETHERLANDS

NTR

NTR is the independent Dutch public service broadcaster specialising in information, education and culture. NTR's themes are based on the statutory duties of the three public service broadcasters which in 2010 merged into NTR: NPS, Teleac and RVU.

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NETHERLANDS

VPRO

VPRO is one in the group of the 9 biggest broadcasting associations in the Netherlands. It is financed by license fees and advertising. There are 3 public channels in the Netherlands that transmit by free cable, free satellite, free terrestrial and free digital television. VPRO can be found on all 3 channels.

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NORWAY

The audience of the three public channels of the group NRK increased their share in 2009, with a daily audience share of 39.1% versus 37.5% in 2008. Nonetheless, the channel NRK1, with 31.1% was ahead of its private competitors. TV 2 had a 21.3% market share, with TVNorge (ProSiebenSat 1 Media AG) trailing behind with 7.1%and TV3 (Modern Times Group) with 6.1%.

TV3 (MTG), Viasat (MTG) and the Voice TV (ProSiebenSat 1 Media AG) are established in the UK, requiring them to comply with the Television without Frontiers Directive but not with specific provisions under Norwegian legislation, particularly in respect of programming and advertising.

Several new channels emerged in the Norwegian market in 2008 and 2009. For example, the satellite TV Distributor Viasat (MTG) has restructured its sports channels package, closing down Viasat Sport and Viasat Motor on the Norwegian market. The two main private channels TVNorge and TV 2 launched HD versions in October 2008 and June 2009 respectively. Finally, Frikanalen, which was launched in October 2008, started broadcasting on the national digital terrestrial television network in 2009. This is an open, non-commercial channel and is owned by around 60 non-governmental organisations. Pay-TV has a very high penetration rate in the Norwegian market, Just under half of all households subscribe to a cable television service. In a country where 73% of homes have broadband Internet access, the IPTV sector is developing apace and there were six competing services in 2009.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Hellfjord: Produced by Tappeluft Pictures with the support of the MEDIA TV Broadcasting scheme *Hellfjord* will air on NRK in 2012.

NRK NORSK RIKSKRINGKASTING (THE NORWEGIAN BROADCASTING CORPORATION)

Norsk Rikskringkasting (The Norwegian Broadcasting Corporation) is the Norwegian government-owned broadcasting company. It is non-commercial and based on public service principles. NRK is the largest media organisation in Norway. It is a founding member of the European Broadcasting Union.

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NORWAY

TV2 NORWAY

TV 2 is the largest commercial television station in Norway and the second largest TV station in Norway. TV 2 started to broadcast in 1992, based on a governmental license to broadcast national commercial terrestrial television.

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TV3 NORWAY

TV3 is a commercial television channel targeting Norway owned by Viasat. It is broadcasting from the UK and thus avoiding the rules in Norway that apply to advertising.

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TVNORGE

TVNorge is a commercial channel, owned by ProSiebenSat1. It went on the air in 1988 as the first advertising supported Norwegian channel.

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NORWAY

POLAND

The most important free-to-air transmission players are still the public group TVP and the two private groups TVN (ITI group) and Polsat. The public channel TVP1 still heads the daily audience figures, with a 19.4% market share (compared with 24% in 2006). TVP2, the second public channel, lost more than 5% of its market share between 2006 and 2010. The two main private channels, TVN and Polsat, have seen their audiences dwindle: their market share in 2010 was 15.2% and 13.8% respectively (against 16.7% and 16.1% in 2006). (Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research).

Following these four channels, there were six that commanded between 1 and 5% of the audience share. The fragmentation of the audience is encouraging the most important groups, which see the audience of their main channels shrinking, to increase the number of special interest channels. For example in 2011, TVP has 9 national channels and 16 regional services, TVN directly provides 10 channels (and the ITI group controls 17), the group Polsat Cyfrowy has 14, as does the Canal+ Cyfrowy group (a subsidiary of the French group Vivendi). These groups are continuing to announce the establishment of new special interest channels.

After three years of discussions, an act amending the Broadcasting and Licence Fees was finally passed in August 2010.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

POLSAT

Polsat is a television broadcaster-commercial station buying movies for all rights. The channel is also available to watch in Sweden. It is active 168 hours per week and free to watch. Polsat is the third national TV channel broadcast via the terrestrial analogue network, it covers more than 72% of the territory and 85% of the population (2006 data). It belongs to the Polsat group of channels. The schedule of Polsat is generalist.

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TVP

TVP is a Polish public station, operating 2 nation-wide channels (TVP1, TVP2) a number of thematic channels: TVP Info, TVP Kultura, TVP Sport, TVP History, and a satellite channel TVP Polonia. Its main activity is in broadcasting, production, worldwide distribution and acquisition.

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POLAND

CANAL PLUS

Established in 1995, Canal+ is a paid TV channel in Poland, Canal+. Programming of Canal+ focuses on feature films (hits, mega hits and premiere movies) and sport (soccer, motorcycle, racing, NBA and others).

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HBO POLAND

HBO Poland is a paid television station which is movie oriented.

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POLAND

TVN

TVN is a private TV station in Poland. Its principle activity is the producing of theatrical movies and TV series.

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POLAND

SPAIN

Hit by the economic crisis, the Spanish audiovisual market has undergone considerable change: for example, 2008 and 2009 saw developments in TV audience rankings, the reform of RTVE, a merger between Cuatro and Telecinco, a rapid increase in the number of special-interest channels, and the switchoff of analogue terrestrial transmissions.

The public channel TVE La Primera, which led the market in 2009 with a 16.4% daily audience share, confirmed this position in 2010 with a 16% share. It therefore overtook Telecinco, a private channel owned by the Italian Mediaset group, , the market share of which has suffered a drop of more than six percentage points since 2006 and is now only 14.6%. Antena 3, controlled by the Planeta de Agostini and Bertelsmann groups, remained in third position but has also lost more than seven percentage points since 2006 and has seen its market share fall to 11.7%. Next, the two most recent additions to the Spanish analogue terrestrial landscape continued to establish themselves: Cuatro (which replaced Canal+ in 2005) with 7% and La Sexta (created by a Spanish-Mexican consortium in 2006) with 6.6%. TVE La 2 followed with a 3.1% daily audience share. The public television channels of the Autonomous Communities also recorded a significant decline: their total market share fell from 15.4% in 2006 to 11.2% in 2010. This decline in the incumbent channels can be explained by the rapid increase in the number of special-interest channels. The audience share of such channels, which was negligible in 2006, may now exceed 2%, as in the case of Antena.Neox or the Disney Channel. (Audience data sources: Eurodata TV Worldwide / Kantar Media)

In spring 2010, a new general law on audiovisual communications was adopted. Debated for six years, its provisions include the creation of a national regulatory authority, the Consejo Estatal de Medios Audiovisuales. This body was set up by a decree of 3 June 2011 but the Partido Popular has announced its intention to abolish it if it won the November 2011 parliamentary elections.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ANTENA 3

Antena 3 is a private Spanish terrestrial channel. Its programming is generalist. When it was launched, Antena 3 was the first national private channel in Spain. It is controlled by Planeta de Augostini and RTL Group.

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SPAIN

ARAGON TELEVISION

Aragon Television is the autonomous regional channel in Aragon.

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CANAL 9 – TVV – TELEVISIÓN VALENCIANA

Canal 9-TVV is one of the six Spanish regional stations and was created in March 88 although it went on the air only in October 1989 broadcasting for the Valencian Community area covering a population of more than 5 million people in the provinces of Valencia, Castellon and Alicante as well as in the Balearic Islands. Canal 9-TVV broadcasts 6.600 hours yearly in Valencia and Castillian through two channel including in its schedule news, sports, current affairs, game shows, movies, series, sitcoms, animation, documentaries, music and entertainment. In-house production covers a 60% of the total broadcasting time and acquisitions are mainly made in the US, England, Japan, Australia.

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CANAL EXTREMADURA TELEVISION

Canal is an autonomous public channel of Extremadura. It is broadcast in Spanish with regional coverage and free access.

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CANAL SUR

Canal Sur is the main regional autonomous public channel of Andalusia.

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SPAIN

CASTILLA LA MANCHA

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SPAIN

ETB1 – EUSKAL TELEBISTA

EITB is the first communication group of Euskadi It has more than 25 years of experience in the communication world. During this time it has consolidated as a modern and efficient media that daily goes over to more than one million citizens, to whom it mainly offers information and entertainment.

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SPAIN

LA SEXTA – (TELEFILM)

La Sexta is a Spanish private terrestrial generalist channel. When it was launched in 2006, la Sexta became the sixth Spanish national terrestrial channel. La Sexta is controled by the GAMP (which includes Mediapro) and the mexican group Televisa.

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TELECINCO – GESTEVISION

Telecinco is a Spanish commercial television channel operated by Gestevisión Telecinco. Launched in 1990 as Tele 5, it was the fifth of the national terrestrial television channels. In 1997, Tele 5 was rebranded as Telecinco, dropping the flower logo seen in other Mediaset channel logos. Telecinco is a general channel catering for all audiences. It shows popular films, series and sport.

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TVE – TELEVISIÓN ESPAÑOLA

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SWEDEN

The main players in the Swedish broadcasting market are public broadcaster SVT, private Swedish groups Bonnier (TV4 and Nordic Canal+ channels) and Modern Times Group – MTG (TV3, TV6, TV8, TV1000 and Viasat channels, some of which are broadcast from the United Kingdom), and the German group ProSiebenSat.1 Media AG, whose channels Kanal 5 and Kanal 9 are also transmitted from the United Kingdom.

In 2009, the public channel SVT1 regained its position as the most watched channel in Sweden, with an increased daily audience share of 20.9%, which it increased even further in 2010 (23.2%), ahead of TV4 (Bonnier), which remained below the 20% mark (19.2%) in 2010. SVT2, Sweden's second public channel, dropped to 6.9% (a market share that has virtually been halved in the space of four years) and lost third place in 2009 to TV3 (MTG) with 8.1%. It is followed by Kanal 5 (ProSiebenSat.1 Media AG) and TV6 (MTG), two established channels, and TV3, broadcast from the United Kingdom

The combined audience share of these six main channels was only 69.4% in 2010, compared to almost 80% four years earlier. Due to this audience fragmentation, the broadcasting groups have increased their range of specialist channels. In terms of total audience share per group, the six SVT channels saw their market share fall from 39.3% in 2006 to 35.2% in 2010, in contrast to the nine TV4 channels, whose share rose from 26% to 31% in 2010. (Audience data source: Eurodata TV Worldwide / MMS Mediamätning | Skandinavien AB)

The main players in the distribution market remain the Swedish groups MTG, TeliaSonera and Teracom, as well as cable operator Com Hem and the Norwegian Telenor group.
The new Radio and Television Act entered into force on 1 August 2010, transposing the Audiovisual Media Services Directive (2007). The Act defines and regulates sponsorship, advertising and product placement. It also creates a new audiovisual regulatory body, Myndigheten för radio och tv (Swedish audiovisual authority), which replaces the radio and television authority (Radio-och TV- Verket, RTVV) and the Swedish audiovisual commission (Granskningsnämnden för radio och TV, GRN)

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

Drottningoffret (The Sacrifice), 2010 – Production Company: Bob Film. (Photographer: Johan Paulin)

Nobels Testamente – Malin Crépin. This TV Crime Drama received MEDIA TV Broadcasting support in 2011. (Photographer: Erik Aavatsmark)

SVERIGES TELEVISION (SVT)

SVT is the Swedish public service broadcaster financed by a compulsory fee. They had 68 hours of broadcasting per day on all their channels. 21.1 % of the programming is fiction.

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KANAL 5 / KANAL 9

Kanal 5 and Kanal 9 are part of ProSiebenSat1 media group and are transmitting from London. Kanal 5 has an entertainment and feature film profile. Kanal 9 is a series, feature film and documentaries as well as sports and events channel.

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SWEDEN

TV4 / CANAL+

TV4 Group started its transmissions in 1990. TV4 Group has a range of channels under the TV4 brand. Canal+ was started by French Canal+ in 1997 but is now owned by TV4. Canal+ is a pay TV service with 15 channels.

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TV3 / TV6 / TV8 / TV10

TV3 started its transmissions in 1987 and was the first commercial channel in Sweden. It has an entertainment and feature film profile. TV6 has a profile of entertainment, sports and fact shows. TV8 has a focus on series and lifestyle. TV10 focuses on sports and documentaries. These channels are all owned by Viasat which is part of MTG (Modern Times Group).

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VIASAT / TV1000

Viasat has a range of pay tv documentary and sports channels as well as the eight TV1000 film channels. Acquisitions for the Nordic market are handled at the London office.

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TURNER BROADCASTING SYSTEM, SWEDEN AND BALTIC NONSTOP TELEVISION

Turner Broadcasting (TBS) Europe delivers some of the world's most successful and well-known news and entertainment channels in 17 languages across approximately 100 countries in Europe, the Middle East and Africa. The brands active in the Nordic and Baltic region includes CNN, Cartoon Network, Boomerang, Cartoonito, TCM (Turner Classic Movies) and Adult Swim. Since the acquisition of Scandinavian Millennium Media Group AB in 2010, Turner is also the home of the channels TNT7, Showtime, Star! and Silver. Turner Broadcasting is a Time Warner Company.

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SWITZERLAND

Switzerland is a federation made up of 26 cantons and has four national languages: French, German, Italian and Romansch. This is reflected in the organisation of the audiovisual landscape, with French, German and Italian channels having a major presence on the Swiss market. Via its four corporate units, the public broadcaster SRG SSR idée suisse offers seven channels in the country's four national languages and they dominate the market by a wide margin[1].

There are also around twenty private channels distributed at the national, indeed international, level and around twenty local channels, most of which broadcast programmes in German or French.

Barely 5% of Swiss households rely mainly on terrestrial transmission for their television services, so the multi-channel platforms have a significant penetration. For example, according to the Swiss cable operators' association Swisscable, 92% of homes subscribe to a cable TV service.

There are four competing IPTV platforms in the Swiss market, operated by Swisscom, Orange and Sunrise, the country's main telecommunication operators, as well as, since April 2011, the ISP Cyberlink. Since spring 2010, the Swisscom TV service has also been available on a computer screen.

Swiss homes are served by two satellite packages: the CanalSat Suisse service was added to that of the public broadcaster Sat-access at the end of 2008. In April 2011, CanalSat launched a HD channel package.

1. Market shares of 30-33% in the three main language regions. The figures rise to between 35 and 41% during primetime between 6 pm and 11 pm (SRG SSR, www.srgssr.ch)

Sources: European Audiovisual Observatory (« Television in 37 European States », Yearbook 2011, Volume 1) and SRG SSR website

RSI

RSI is part of the group SRG SSR, the Swiss public broadcaster. The Italian unit operates two channels: LA 1 and LA 2. LA 1 is a full service channel aimed at a broad audience. LA 2 is a complementary channel with a focus on sport. There are also children's programs and repeats of news programs from LA 1. The drama editorial line looks for strong and realistic fiction stories. RSI also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions, both for cinema and television.

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RTS

RTS is the national French speaking language public service channel in Switzerland. It operates two channels. RTS 1 is a mainstream channel. The prime-time schedule showcases its major in-house productions. RTS 2 complements RTS 1 with sports coverage, documentaries, arts programming and a special strand for young people. RTS also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

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SRF

SRF is the German language public service channel in Switzerland and operates three television channels. SF 1 – a high-quality schedule of news and current affairs, light entertainment and arts, with a large proportion of in-house productions – reflects the complex reality of life in culturally diverse Switzerland. SF zwei gives heavy emphasis to sport, feature films and series. The schedule is aimed more at a younger audience. SF info offers viewers time-shifted viewing with running repeats of the latest information-based formats - news, sport and the arts. SRF participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

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UNITED KINGDOM

The public service channel BBC1 remains the most popular in the UK (with an audience share in 2010 of 20.8%, just 2% down from 2006), followed by ITV1 (16.6%). The UK television market is also one of the largest in Europe with an extensive number of national thematic channels and also many channels that are targeting other countries. This includes a very large number of Arabic, Asian and Turkish channels with an international focus that are licensed in the UK. (Audience data source: Eurodata TV Worldwide / BARB / TNS UK)

In recent years, there have been significant changes to the media ownership landscape. In 2010, the RTL Group sold the Channel Five Group to the UK company Northern & Shell (involved in publishing, Express Newspapers, and adult channels). At the same time Virgin Media began moving out of the broadcasting sector in order to focus on its distribution business. In June 2010, Virgin Media sold Virgin Media Television to BSkyB (including the Bravo, Challenge, Living, and Trouble brands). The company was re-branded as the Living TV Group. The last broadcasting interests of the company: 50% share in the UKTV channels, a joint-venture with the BBC Worldwide, were sold to the US company Scripps Networks in August 2011. Finally, in 2011 ITV PLC took over Channel Television, the company with the channel 3 licence for the Channel Islands. Aside from STV and UTV, ITV PLC now holds all the channel 3 licences.

In 2010 News Corporation announced its intention to increase its ownership of BSkyB (from 39% to 100%). However, following the phone-hacking scandal and pressure from parliament the bid was eventually withdrawn. Ofcom, following a request of the Culture Minister, launched a consultation in October 2011 in order to review ownership and plurality in the UK media.

Analogue switch-off is well under way in the UK and the planned completion date is October 2012. HD channels are being made available in areas in line with their switch-off of analogue services. Currently this includes BBC HD, ITV1 HD, Channel 4 HD, S4C HD, STV HD, (and from 2012 also FIVE HD)

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The Promise, 2011 – Production Company: Daybreak Pictures

UNITED KINGDOM

BBC

The BBC is the largest broadcasting organisation in the world. Its mission is to enrich people's lives with programmes that inform, educate and entertain. It is a public service broadcaster, established by a Royal Charter and funded by the licence fee that is paid by UK households. The BBC uses the income from the licence fee to provide services including 8 national TV channels plus regional programming, 10 national radio stations, 40 local radio stations and an extensive website.BBC World Service broadcasts to the world on radio, on TV and online, providing news and information in 32 languages. It is funded by a government grant, not from the licence fee. The BBC also has a commercial arm, BBC Worldwide. Its profits are returned to the BBC for investment in new programming and services.

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BBC WALES

BBC Cymru Wales (also known as English: BBC Wales or Welsh: BBC Cymru) is a division of the British Broadcasting Corporation for Wales. Based at Broadcasting House in the Llandaff area of Cardiff, it directly employs over 1200 people, and produces a broad range of television, radio and online services in both the Welsh and English languages. Outside London, BBC Wales is the largest BBC production centre in the United Kingdom, partly due to its additional slate of Welsh language programmes for BBC Radio Cymru and the Welsh language television channel S4C.

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BBC NORTHERN IRELAND

BBC Northern Ireland (Irish: BBC Thuaisceart Éireann / Ulster Scots: BBC Norlin Airlann) is the main public service broadcaster in Northern Ireland. The organisation is one of the three national regions of the BBC, together with BBC Scotland and BBC Wales. Based at Broadcasting House, Belfast, it provides television, radio, online and interactive television content. BBC Northern Ireland currently employs 700 people, largely in Belfast.

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BBC SCOTLAND

BBC Scotland (Gaelic: BBC Alba) is a constituent part of the British Broadcasting Corporation, the publicly-funded broadcaster of the United Kingdom. It is, in effect, the national broadcaster for Scotland, having a considerable amount of autonomy from the BBC's London headquarters, and is run by the BBC Trust, who are advised in Scotland by the Audience Council Scotland. Its Scottish headquarters and studios are at BBC Pacific Quay on the south bank of the River Clyde, beside the STV headquarters and the Glasgow Science Centre.

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UNITED KINGDOM

CHANNEL 4

Channel 4 is a public service for information, education and entertainment. The Broadcasting Act 1990 requires that Channel 4 programmes shall: appeal to tastes and interests not generally catered for by ITV, encourage innovation and experiment, be distinctive, maintain a high general standard and a wide range, include a proportion which are educational, provide high quality news and current affairs, include proportions which are European and are supplied by independent producers.

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ITV is the biggest commercial television network in the UK, broadcasting the most talked about television and making a major contribution to the UK's culture, economy and communities. The ITV Network is made up of 15 regional licences, providing television to viewers across the UK. 11 of the licences in England and Wales are owned by ITV Plc, formed in 2004 following the merger of Carlton and Granada. SMG owns the two Scottish licences, Scottish Television and Grampian; UTV and Channel Television own the licences for Northern Ireland and the Channel Islands respectively.

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BSKYB

Sky One is an entertainment channel (with sumulcast in HD). In addition to providing a television satellite service to subscribers (over 9.3 million households at the end of March 2011), BSKYB also has a portfolio of TV channels: Sky1, Sky Living, Sky Atlantic, Sky Arts 1 & Sky Arts 2, Sky 3D and Challenge.

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UKTV

UKTV is a major industry player and one of the most important and successful multi-channel providers in the UK. Formed in 1997, it is an independent commercial joint venture, between Virgin Media and BBC Worldwide, the commercial arm of the BBC. Attracting 36 million viewers each month, the network offers a broad range of quality programming across its entertainment, lifestyle and factual offerings - Watch, GOLD, Dave, Alibi, Eden, Blighty, Yesterday, Home, Really and Good Food. UKTV currently operates 24 broadcast streams when multiplexes (+1s) and HD channels are taken into account, and complementary websites for every channel brand. The success of UKTV is based on its programming including award-winning shows from the BBC and an increasing number of original commissions (around 700 hours a year) and acquisitions. All ten UKTV channels are available on Sky Digital and Virgin Media, with Dave, Yesterday and Really also on Freeview.

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VIRGIN MEDIA TV

Virgin Media (officially Virgin Media Inc.) is a company which provides television, telephone and broadband internet services to domestic and business customers in the United Kingdom, delivered primarily through its fibre-optic cable network. The company was formerly known as ntl:Telewest following the merger of NTL Incorporated with Telewest Global, Inc. A further merger with Virgin Mobile UK in 2006 created the first "quadruple-play" media company in the United Kingdom, bringing together television, Internet, mobile phone and fixed-line telephone services.

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UNITED KINGDOM

S4C

S4C has a staturory obligation to broadcast to a majority of Welsh language output during peak viewing hours (1800 – 2200). The schedule provides a wide variety of popular TV – drama, entertainment, sports, music, news and current affairs, games and quizzes, youth and children's programming.

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Incoming Commissioning Editor for Drama to be announced in April 2012.
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STV

STV's broadcasting business incorporates two licences – one for the north of Scotland and one for central Scotland. Together, these services produce dedicated regional programming to over three and a half million viewers across Scotland each week. STV's wide range of programming reflects Scotland's distinctive political, legal, educational, cultural and sporting institutions via news, current affairs and non-news programming, including original drama and factual documentaries. News is at the heart of both services, with STV News bringing viewers live, comprehensive and up-to-the-minute news from across the region with regular evening news programmes and bulletins throughout the day.

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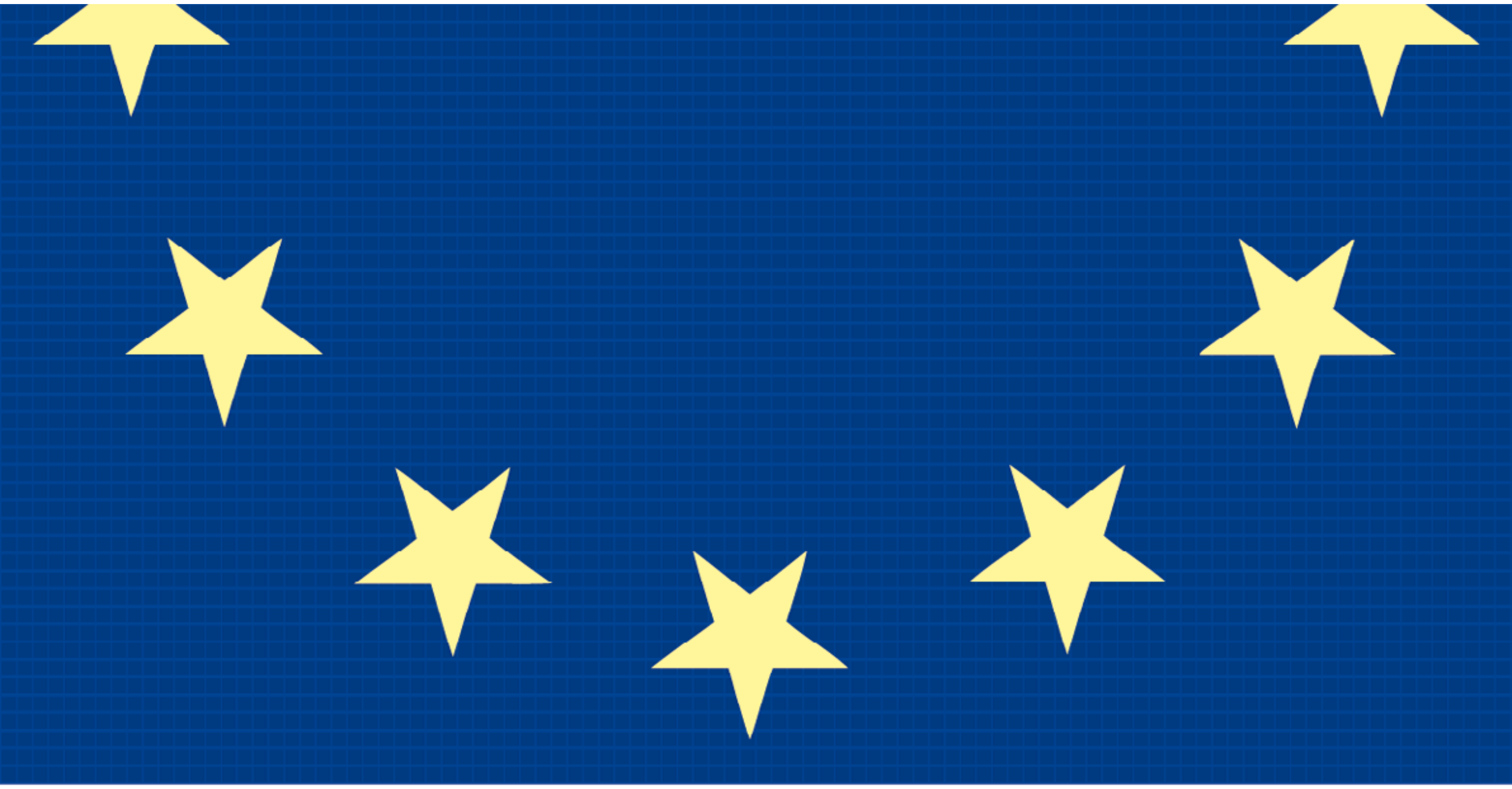

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